



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution

DOD: 05/04/2006		PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 10/20/2014 to 12/15/2014	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$125,000.00	
<input type="checkbox"/>	Verified	Beginning POH - \$125,000.00	
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$58,444.52	
<input type="checkbox"/>	PTC	Executor (Statutory) - \$2,560.00	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney (Statutory) - \$2,560.00	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/	X/O - \$1,000.00 (for Court confirmed sale of real property pursuant to Local Rule 7.18(B)(1))	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Costs (Certified copies) - \$25.50	
<input type="checkbox"/>	Conf. Screen	Bond - \$52.10	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/>	Objections	<ul style="list-style-type: none"> • Arthur K. O'Brien - \$17,270.64 • Michael R. O'Brien - \$17,270.64 • Melvin O'Brien - \$17,270.64 	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: LV
Reviewed on: 02/09/2015
Updates:
Recommendation:
File 1 – O'Brien

[Fifth] Amended Waiver of Accounting and Petition for Final Distribution and for Allowance of Compensation

DOD: 3-31-12		<p>GREGORY TAYLOR, Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>[Second] Amended I&A filed 1-15-15: \$278,817.29 (cash)</p> <p>POH: \$278,817.29 (cash)</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): \$8,576.35</p> <p>Petitioner states he is the sole heir of the Mason family upon the death of the Administrator Joseph Mason and has waived accounting and statutory fees.</p> <p>See also Declaration of Attorney Armas filed 10-15-14 and Declaration of Gregory Taylor filed 1-15-15.</p> <p>Petitioner states the decedent and her spouse (now deceased) signed a trust that Mr. Armas had prepared for them. The trust provides for a distribution identical to the distribution set forth in the decedent's will. Although the trust was prepared and signed, no assets were transferred to the trust. Therefore, there are no trust assets. The distribution in this matter should therefore be pursuant to Article Fifth of the decedent's will.</p> <p>Petitioner requests distribution as follows: Christopher Taylor: \$10,000.00 Jeffrey Taylor: \$5,000.00 Nicole Taylor: \$5,000.00 Gregory Taylor, Sr.: \$250,240.94</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p align="center"><u>SEE ADDITIONAL PAGES</u></p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
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<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 11-9-12		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 2-9-15
Updates:
Recommendation:
File 3 – Mason

Page 2 - NEEDS/PROBLEMS/COMMENTS:

1. **The Court may require further clarification regarding what, exactly, the cash sum indicated on the Second Amended Inventory and Appraisal represents.**

Background: The first I&A filed 11-2-12 included \$204,522.95 in six separate investment accounts, plus real property valued at \$300,000.00. The I&A did not state whether the assets were the separate property or community property assets of the decedent; however, it was later noted that the same real property was also inventoried as an asset of the Estate of Joseph Mason in 14CEPR00064, along with one of the accounts listed.

An amended I&A filed 10-15-14 indicated cash of \$277,794.06, which also happened to be the amount of property on hand, with a footnote as follows: *"The above sum represents separate property of Juanita Mason. There is an additional \$277,794.06 that is assigned to the Estate of Joseph Mason as his community property interest and not subject to distribution by this estate."* (It is unclear to the Examiner what that statement means, but it appears to indicate that there was community property between the couple, but unclear what assets were in that category.)

This second amended I&A filed 1-15-15 indicates cash of \$278,817.29, with a footnote as follows: *"The above sum represents separate property of Juanita Mason."*

As noted on previous Examiner Notes, this simple cash sum does not appear to be an accurate representation of this decedent's assets as of the date of death. Petitioner explains in his declaration that all accounts were consolidated into one account, and some things like property taxes were paid from the account. However, even with that information, the I&A should still reflect the date of death assets and total, which was originally listed as six separate accounts totaling \$204,522.95, and the property on hand (POH) would be the consolidated lump sum at present.

Note: The attorney's statutory compensation should be based on the I&A date of death value, and if gains are used in calculation, detailed schedules of such gains must be included pursuant to Cal. Rule of Court 7.705(b). Here, the attorney is requesting compensation based on the new value, which is the POH, but no schedules are provided, and it is unclear if this sum originated as the six accounts noted on the original I&A.

Additional note: In addition to the house, which has since been removed from this estate, it was also noted that one of the original accounts listed (Golden 1) was also listed as an asset of the decedent's husband's estate. Need clarification: Does the amended value include that amount?

SEE ADDITIONAL PAGES

Page 3 - NEEDS/PROBLEMS/COMMENTS (Continued):

2. As previously noted, the decedent's will distributes her estate to the Mason Family Trust of 2004. Petitioner states that the trust was never funded; therefore, distribution should be made directly to heirs pursuant to Article Fifth of the decedent's will. Examiner Notes previously noted that the trust did appear to have been funded by the execution of Schedule A Transfer of Assets; therefore, distribution should be made to the Trust pursuant to Article Third of the Will, and a declaration pursuant to Local Rule 7.12.5 is needed.

Attorney Armas continues to request distribution directly to the heirs; however, no authority is provided.

Examiner notes also that Article Fifth of the will does not appear to distribute directly to the heirs as requested; rather, it appears to create a testamentary trust based on the 2004 trust.

3. Proposed order does not appear to include distribution of the residue. Need revised order based on clarification of the above noted issues and the Court's order thereon.

(1) First Account Current and Report of Guardian and Petition for its Settlement; (2) for Allowance of Attorney Fees and Reimbursement of Costs Advanced; and (3) Request for Waiver of Further Accountings

		VALENE MADRID , Guardian, is petitioner. See petition for details	NEEDS/PROBLEMS/COMMENTS: 1. Declaration filed of Valene Madrid re: Annuity Account with Standard Insurance Company filed 03/11/2014 states funds are deposited into an annuity with standard insurance company, funds are not federally insured. Probate Code §2453 requires the funds to be insured. Note: Petition requests waiver of further accountings. If the Court does not waive further accountings, the following Status Hearing shall be set: <ul style="list-style-type: none"> Wednesday, February 8, 2017 at 9:00a.m. in Department 303, for the filing of the 2nd Account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the date set the status hearing will come off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 02/09/2015	
		Updates:	
		Recommendation:	
		File 4 - Dupree	

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

[illegible]

(1) Petition for Termination of Further Proceedings and (2) Discharge of the Personal Representative

DOD: 8-20-13		SPECIAL ADMINISTRATION EXPIRES 2-26-16	NEEDS/PROBLEMS/COMMENTS:
		ERIC SCHLOEN , Special Administrator, is Petitioner.	
		Petitioner was appointed Special Administrator for the purpose of obtaining health care benefits for the decedent.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: skc
			Reviewed on: 2-10-15
			Updates:
			Recommendation:
			File 6 - Sanchez

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

DOD: 7/24/2007		PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4/14/14 – 12/23/14	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$180,000.00	
<input type="checkbox"/>	Verified	Beginning POH - \$180,000.00	
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$ 36,962.59	
<input checked="" type="checkbox"/>	PTC	Administrator - \$2,200.00 (statutory)	
<input checked="" type="checkbox"/>	Not.Cred.	Administrator x/o - \$1,248.00 (per Local Rule for sale of real property and preparation of tax returns.)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$2,200.00 (statutory)	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.	Bond - \$300.00 (o.k.)	
	Sp.Ntc.		
	Pers.Serv.	Court fees - \$460.50 (filing fee, certified copies)	
	Conf. Screen	Distribution, pursuant to intestate succession, is to:	
<input checked="" type="checkbox"/>	Letters 4/14/14	Derek Thomas - \$2,455.26 (\$10,184.70 less child support levy of \$7,729.43)	
	Duties/Supp	Javonni M. Thomas - \$10,184.70	
	Objections	Keshawn Monte Thomas - \$10,184.70	
	Video Receipt	Department of Child Support Services - \$7,729.43	
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 2/10/15
Updates:
Recommendation:
File 7 - Thomas

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMPORARY EXPIRES 2/19/15	NEEDS/PROBLEMS/COMMENTS:
		ERWIN AVLAOS LOPEZ , ward, is petitioner	1. Petition does not request that the court make the specific findings needed regarding eligibility for Special Immigrant Juvenile Status.
Cont. from			2. Need Order Regarding Eligibility for Special Immigrant Juvenile Status (Judicial Council form #GC-224).
	Aff.Sub.Wit.		
✓	Verified		3. Need Notice of Hearing.
	Inventory		
	PTC		4. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Bernabe Avalos (paternal grandfather) b. Modesta Jacinto (paternal grandmother) c. Izabel Lopez Santos (maternal grandmother) d. Abner Lopez (brother) e. Nancy Lopez (sister)
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

9A Hailey Suarez & Hayden Suarez (GUARD/P) Case No. 14CEPR01133**Atty McCoy, Gail (pro per – maternal grandmother/Petitioner)****Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)**

Hailey, 14	<u>TEMPORARY EXPIRES 02/18/15</u>		NEEDS/PROBLEMS/COMMENTS:
Hayden, 7	GAIL MCCOY, maternal grandmother, is Petitioner.		<u>CONTINUED FROM 02/18/15</u> See page 9B for notes regarding the general hearing.
	Father: JOSEPH SUAREZ		1. Need Notice of Hearing.
	Mother: MELISSA FLYNN – Consent & Waiver of Notice filed 12/17/14		2. Need proof of personal service of Notice of Hearing with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Cont. from 010515	Paternal grandfather: DECEASED Paternal grandmother: DONNA FALCONE		a. Joseph Suarez (father)
Aff.Sub.Wit.	Maternal grandfather: DECEASED		b. Hailey Suarez (minor)
✓ Verified	Petitioner states - SEE PETITION FOR DETAILS		
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
Conf. Screen			
Letters	x		
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	x		
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 02/09/15
			Updates:
			Recommendation:
			File 9A - Suarez

9A

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Hailey, 14		<p align="center">TEMPORARY EXPIRES 02/18/15</p> <p>GAIL MCCOY, maternal grandmother, is Petitioner.</p> <p>Father: JOSEPH SUAREZ</p> <p>Mother: MELISSA FLYNN – <i>Consent & Waiver of Notice</i> filed 12/17/14</p> <p>Paternal grandfather: DECEASED Paternal grandmother: DONNA FALCONE</p> <p>Maternal grandfather: DECEASED</p> <p>Petitioner states See Petition for details</p> <p>Objection to Guardianship filed 01/29/15 by Joseph Suarez (father)</p> <p>Court Investigator Julie Negrete filed a report on 02/09/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need <i>Notice of Hearing</i>. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> <i>Consent & Waiver of Notice</i> <u>or</u> <i>Declaration of Due Diligence</i> for: <ol style="list-style-type: none"> Joseph Suarez (father) – personal service required Paternal grandmother – service by mail sufficient Hailey Suarez (minor) – personal service required
Hayden, 7			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF
Reviewed on: 02/09/15
Updates: 02/10/15
Recommendation:
File 9B - Suarez

		BETTY ANN BIANCHI and ROBERT W. BIANCHI are Co-Trustees. The Fourth Account for the account period ending 12/31/13 was approved on 7/21/14. Minute order dated 7/21/14 set this status hearing for the filing of the Fifth Account.	NEEDS/PROBLEMS/COMMENTS: 1. Need Fifth Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.				
Cont. from							
<input type="checkbox"/>	Aff.Sub.Wit.						
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<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 2/10/15</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 13 - Silberstein</td> </tr> </table>			Reviewed by: KT	Reviewed on: 2/10/15	Updates:	Recommendation:	File 13 - Silberstein
Reviewed by: KT							
Reviewed on: 2/10/15							
Updates:							
Recommendation:							
File 13 - Silberstein							

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

DOD: 06/02/2011	TONI RICHARDSON , daughter, was appointed Administrator with Limited Authority, without bond, on 02/16/12.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 12/17/2014: Counsel's request for continuance is granted. 1. Need First Account or Petition for Final Distribution or current status report.
	Letters issued on 02/22/12.	
	Partial No. 1 Inventory and Appraisal filed 04/16/2013 shows an estate valued at \$175,500.00.	
Cont. from 111214, 121714	Inventory and Appraisal filed 05/14/2013 shows the estate reappraised at \$170,000.00	
Aff.Sub.Wit.	Order Confirming Sale of Real Property was filed 05/21/13.	
Verified	Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked account filed 09/20/2013 indicates \$105,594.07 was received.	
Inventory	Notice of Status Hearing filed 09/15/2014 set this matter for hearing. Notice was mailed to Toni Richardson and Attorney Warren Felger on 09/15/2014.	
PTC	Former Status Conference Statement filed 12/11/2014 states petitioner originally filed documents in this matter pro per however became overwhelmed by the requirements of the Court regarding preparation and filing of documents, she retained attorney Warren Felger to assist her. Mr. Felger filed many of the documents prepared in this matter, and advised her what to do as Administrator. Due to the Administrator's inability to reach Mr. Felger, who had been her attorney on several other matters for her, she terminated Mr. Felger's services and retained Linda K. Durost, Esq. to assist them in preparing and filing the last item to be filed, an Account and Petition for Final Distribution. Ms. Durost was retained on or about 10/07/2014. From the date of retention, Ms. Durost has made several attempts to contact Mr. Felger. On the fifth attempt, Mr. Felger returned the call and signed the prepared Substitution. It took approximately 1.5 weeks to get his file. The file was in disarray, and attorney Durost took a great deal of time to go through the history, as well as numerous accounting, bank account statements, and many other very confusing documents. The accounting is quite complicated due to advice given to the Administrator regarding how and what she needed to do for the estate and records to keep. Attorney Durost must prepare and refile a corrected Inventory and Appraisal to remove a sum from the probate assets that are not a part of the probate distribution. Administrator therefore requests that a continuance of this matter be given to allow the tax returns to be filed, a corrected Inventory and Appraisal to be prepared and filed, and address any further issues. A 60-day continuance is requested.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Letters		
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Objections		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 02/09/2015
Updates:
Recommendation:
File 14 – Bonham

DOD: 12/19/12 Cont. from 041814 071814, 101614, 121614 <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100px;">Aff.Sub.Wit.</td><td style="width: 50px;"></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>MANUEL ROJAS, brother, was appointed as Administrator of the Estate with Full IAEA and without bond on 02/14/13. Letters of Administration were issued on 02/20/13.</p> <p>Order on Ex Parte Petition to Amend Petition for Probate filed 07/23/13 ordered that Manuel Rojas file a bond in the amount of \$315,000.00. Bond was later increased to \$400,000.00 by Ex Parte Order to Increase Bond filed 08/16/13.</p> <p>Bond was filed 08/26/13 and new Letters of Administration were issued to Manuel Rojas on 08/28/13.</p> <p>Administrator Manuel Rojas died on 12/08/13. Pat Hernandez, sister, was appointed as successor Administrator with bond in the amount of \$400,000.00 on 03/19/14. Bond was filed 03/25/14 and Letters of Administration were issued to Pat Hernandez on 03/25/14.</p> <p>Minute Order from hearing appointing Manuel Rojas as Administrator on 02/14/13 set this matter for status regarding filing of the First Account/Petition for Distribution.</p> <p>Status Conference Statement filed 12/11/14 states: The accounting of this estate was complicated by the death of the first administrator. His records were not easily obtainable from his records after his death. He paid bills with money orders instead of keeping a checkbook and did not keep all copies of the money orders. An accounting is now being compiled and it is planned to be filed within the next 30 days. A 60 day continuance is requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 12/16/14</u> As of 02/09/15, nothing further has been filed.</p> <p>1. Need First Account and/or Petition for Final Distribution <u>or</u> current written status report.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 20px;"> <tr><td>Reviewed by: JF</td></tr> <tr><td>Reviewed on: 02/09/15</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 15 – Sanchez</td></tr> </table>	Reviewed by: JF	Reviewed on: 02/09/15	Updates:	Recommendation:	File 15 – Sanchez
Aff.Sub.Wit.																																																					
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FTB Notice																																																					
Reviewed by: JF																																																					
Reviewed on: 02/09/15																																																					
Updates:																																																					
Recommendation:																																																					
File 15 – Sanchez																																																					

		<p>TIMOTHY WARREN FLETCHER, Son, was appointed as Conservator of the Person and Estate on 10-16-14 with bond of \$380,129.64.</p> <p>At the hearing on 10-16-14, the Court set this status hearing for the filing of the bond.</p> <p>On 12-3-14, the Court authorized a reduced bond in the amount of \$250,000.00 and the remaining \$130,129.64 to be deposited to a blocked account, and continued this status hearing for the filing of the bond and the receipt for blocked account.</p> <p>Bond was filed and Letters issued on 12-15-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need receipt for blocked account (MC-356).</p>
Cont from 111214, 120314, 012815			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 2-6-15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Pace</p>	

Status Hearing Re: Receipt for Blocked Account

		TIMOTHY WARREN FLETCHER , Son, was appointed as Conservator of the Person and Estate on 10-16-14 with bond of \$380,129.64.	NEEDS/PROBLEMS/COMMENTS: 2. Need Inventory and Appraisal pursuant to Probate Code §2610 or verified written status report pursuant to Local Rule 7.5.
Cont from 111214, 120314, 012815		At the hearing on 10-16-14, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Aff.Sub.Wit.			
Verified		On 12-3-14, the Court authorized a reduced bond in the amount of \$250,000.00 and the remaining \$130,129.64 to be deposited to a blocked account, and continued this status hearing for the filing of the bond and the receipt for blocked account (See Page A).	
Inventory			
PTC		Bond was filed and Letters issued on 12-15-14.	
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc
Reviewed on: 2-6-15
Updates:
Recommendation:
File 16 – Pace

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 12-22-14 Voting rights affected – need minute order <u>Minute Order 1-14-15:</u> Examiner notes handed in open court; matter continued to allow time for defects to be cured. <u>Note:</u> As of 2-6-15, nothing further has been filed. The following issues remain noted: 1. Need Confidential Conservator Screening Form (GC-314). 2. Need Citation. Note: Proof of Personal Service attached to Notice of Hearing filed 12-5-14 indicates that the proposed conservatee was served with a citation; however, the Citation (mandatory Judicial Council form GC-320) has not been filed. 3. Need video receipt pursuant to Local Rule 7.15.8.A. 4. Need Letters.
Cont 011415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
	Conf. Screen	X		
	Letters	X		
✓	Duties/Supp			
	Objections			
	Video Receipt	X		
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation	X		
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-6-15	
			Updates:	
			Recommendation:	
			File 17 – Ohanesian	

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: If this petition goes forward, the following issues exist: 1. Need Court Investigation (and/or DSS Investigation), clearances. 2. Need clarification: Petitioner Della Ann Zambrano states she is the maternal grandmother, but Rosa Zambrano Aguilera of West Monroe, LA, is listed as the maternal grandmother on the Child Information Attachment. What is Petitioner Della Ann Zambrano's relationship to the minor? 3. Need Notice of Hearing to all relatives pursuant to Probate Code §1511.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	x		
	Aff.Mail	x		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	x		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-10-15	
			Updates:	
			Recommendation:	
			File 18 – Mendoza-Wallace	

Petition to Determine Succession to Real Property (Prob. C. 13151)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. The petition is blank at #9a(1) and (2). Was the decedent survived by a spouse, or no spouse, and if no spouse, was the decedent divorced or never married, or is the spouse deceased? <u>Note:</u> Petitioners provide a status dissolution judgment from 1999 between the decedent and Nunik Aslanyan and an interspousal grant deed from 2004 where Nunik Aslanyan conveyed the real property to the decedent; however, the decedent's death certificate in 2008 indicates that the informant was "Nunik Aslanyan, Wife." 2. The petition is blank at #9a(7) and (8). Was the decedent survived by issue of a predeceased child? 3. Need Attachment 11, which should contain a legal description of the real property passing to Petitioners and state the decedent's interest in the real property. 4. Need Attachment 14, which should state the names and relationships to the decedent of all heirs, including Petitioners. <u>Note:</u> Petitioners do not state their relationship to the decedent. <u>Note:</u> If other relatives/heirs are listed, need Notice of Hearing pursuant to Probate Code §13153.	
DOD: 9-20-08				
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc Reviewed on: 2-10-15 Updates: Recommendation: File 19 - Vareldjian				

Atty Nelson, Kelley (Pro Per – Son – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12-24-13			KELLEY NELSON , Son, is Petitioner and requests appointment as Executor with Full IAEA without bond. Full IAEA – need publication Will dated 8-12-09 (not provided) Residence: Clovis, CA Publication: Need Estimated value of estate: \$120,208.55 <i>Note: Petitioner filed a Final Inventory and Appraisal indicating an estate value of \$170,208.55; however, Petitioner indicates that the real property is encumbered.</i> Probate Referee: Steven Diebert <i>Note: This matter would have been assigned to Probate Referee Rick Smith pursuant to Probate Court practices; however, I&A filed concurrently with the petition was prepared by Probate Referee Steven Diebert.</i>	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner did not provide a copy of the will with the petition pursuant to #3e(2) and Probate Code §8002(b). 2. The original will has not been deposited with the Court pursuant to Probate Code §8200. Need original will. 3. Need publication pursuant to Probate Code §8120. 4. Need Notice of Petition to Administer Estate (DE-121) and service on relatives listed at #8 of the petition pursuant to Probate Code §8110. <i>Note: Petitioner used the regular Notice of Hearing form DE-120; however, notice regarding opening estate administration requires specific form and language.</i> 5. Need date of death of deceased spouse pursuant to Local Rule 7.1.1.D. 6. The petition is blank at #5a(3) and (4). Was the decedent survived by a registered domestic partner? 7. The petition is blank at #5a(6) and (7). Was the decedent survived by issue of a predeceased child? <i>Note: If granted, the Court will set a status hearing for the filing of the petition for final distribution for <u>June 15, 2016</u> pursuant to Probate Code §12200. If the petition is filed pursuant to Local Rule 7.5.C, the status hearing may be taken off calendar.</i> <i>Note: A status hearing for the filing of the I&A is not included since the petitioner has already filed the I&A concurrently with this petition. However, Examiner notes that the I&A as filed includes a negative balance for an IRA account. The Court may require clarification.</i>
	Aff.Sub.Wit.	x		
✓	Verified			
✓	Inventory			
✓	PTC			
	Not.Cred.			
	Notice of Petition to Administer Estate	x		
✓	Aff.Mail	w		
	Aff.Pub.	x		
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: skc
Reviewed on: 2-10-15
Updates:
Recommendation:
File 20 - Nelson

Second Account and Report of Successor Trustee and Petition for Allowance of
 Trustee Fees and Attorney Fees

		<p>MARK OLSEN, private professional fiduciary, is petitioner.</p> <p>Please see petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Need Amended Petition. A Supplement to the Second Account was filed on 1/9/15. The supplement changes material facts such as the beginning and ending property on hand. It appears that an amended petition should be filed in order to give the court, and all interested parties, one complete and concise pleading. It should be noted that the prior examiner notes suggested an amended pleading be filed. Examiner has not reviewed the Supplement to the Second Account for this hearing. Notes provided are from the prior hearing.</p> <p>1. Beginning property on hand in this, the 2nd account is \$335,240.14. The ending property on hand in the first account was \$324,340.99 a difference of \$10,900.15. The beginning property on hand for the 2nd account must be the same as the ending property on hand in the first account. Need amended accounting.</p> <p>Please see additional page.</p>	
Cont. from 121814, 020315				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: KT</p> <p>Reviewed on: 2/10/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 - Bustos</p>				

NEEDS/PROBLEMS/COMMENTS (cont.):

1. Attorney fees includes \$120 for communications with the Probate Examiner (identified as court investigator in the declaration). Local Rule 7.17B considers communication with the Probate Examiner to be a normal cost of doing business and is therefore not reimbursable.
2. Disbursement schedule shows payments totaling \$655.00 to Grey Roberts for professional services. Need more information on what professional services were provided.
3. Disbursement Schedule shows legal fees totaling \$6,223.26. Order approving the First Account allowed attorney fees totaling \$4,962.50. A difference of \$1,260.76. Need clarification.
4. Disbursement schedule identifies several disbursements (totaling \$6,000.08) as "- split- -" Probate Code § 1062(b) requires the disbursement schedule to include the nature and purpose of each item, the name of the payee and the date thereof. Need clarification.
5. Disbursement schedule shows a payment of \$507.40 on 10/25/12 without identifying what the purchase was for. Need clarification.
6. Order does not comply with Local Rule 7.6.1C. All orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, September 28, 2016** at 9:00 a.m. in Department 303, for the filing of the third account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

24 Nathan Finney, Breanna Finney & Rikki Finney (GUARD/P)

Case No. 15CEPR00122

Atty Stone, Tennison Anita (pro per – step-mother/Petitioner)

Atty Finney, Breanna Marie (pro per – minor/Petitioner)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Nathan, 16	<u>TEMPORARY GRANTED EX PARTE</u>		NEEDS/PROBLEMS/COMMENTS:
Breanna, 14	<u>EXPIRES 02/18/15</u>		
	<u>GENERAL HEARING: 04/08/15</u>		1. Need Notice of Hearing.
	TENNISON STONE , step-mother, and BREANNA FINNEY , minor, are Petitioners and request that TENNISON STONE be appointed as guardian.		
Cont. from	Father: RICK FINNEY		2. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardianship of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Aff.Sub.Wit.	Mother: DESIRE NEVES		
✓ Verified	Paternal grandfather: RICK FINNEY		a. Rick Finney (father)
Inventory	Paternal grandmother: TONI KEMP		
PTC	Maternal grandfather: LEONARD NEVES		b. Desire Neves (mother)
Not.Cred.	Maternal grandmother: MARY NEVES		
Notice of Hrg	x	Sibling: CHANTELE FINNEY (3), SHAYNNA FINNEY (6)	c. Nathan Finney (minor)
Aff.Mail			
Aff.Pub.			d. Breanna Finney (minor)
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen		Petitioners state – see Petition for details.	
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			

Reviewed by: JF

Reviewed on: 02/10/15

Updates:

Recommendation:

File 24 - Finney